

**DRAFT**

# **Waterfront Parking Strategy**

## **Summary Report**



April 2002

## EXECUTIVE SUMMARY

### The Need for a Waterfront Parking Strategy

Over the past decade, public and private investments have revitalized the waterfront. The Port of Seattle redeveloped underutilized properties that once served industrial and maritime needs of the city, bringing office and residential uses, a Cruise Ship terminal, a conference center, public boat moorage and a maritime museum to the central waterfront. New projects including the Pacific Northwest Aquarium and the Olympic Sculpture Park promise to bring more visitors to the waterfront, as will increased Cruise Ship sailings. A comprehensive waterfront parking strategy can help us balance the access and parking needs of a revitalized waterfront with preservation of neighborhood character and businesses.

### Developing the Strategy

The need for a waterfront parking strategy was first articulated by the Aquarium Oversight Committee, a group of City and Seattle Aquarium Society officials that provides guidance for the development of the new aquarium. At the request of the Committee, waterfront parking study funds were approved in the 2001 City of Seattle budget and the City's Strategic Planning Office (SPO) was asked to lead the study.

SPO convenes public private and community stakeholders—the Waterfront Stakeholders Group—on a monthly basis to provide stewardship and coordination of waterfront initiatives. SPO asked members of the Waterfront Stakeholders Group to help develop the scope of work for the waterfront parking strategy. These discussion led to a partnership between SPO and the Seattle Aquarium, Pike Place Market Preservation & Development Authority, Port of Seattle and Metropolitan Improvement District.

Table 1

<b>Projected Future Public Parking Supply and Demand in Primary Waterfront Zone (Western &amp; Alaskan Way between Virginia and Yesler)</b>						
Supply/ Demand	2001			2008		
	On-Street		Off-Street	On-Street		Off-Street
	Un-Metered	Metered	Public Lots	Un-Metered	Metered	Public Lots
Supply	13	491	1,525	13	250	1,475
Demand	13	371	1,132	13	225	1,678
Change in Demand				0	-146	+546
<b>Occupancy</b>	<b>100%</b>	<b>74%</b>	<b>74%</b>	<b>100%</b>	<b>90%</b>	<b>114%</b>
<b>% Increase in Demand</b>				<b>+0%</b>	<b>+16%</b>	<b>+40%</b>

*Assumptions: Planned projects including Pacific Northwest Aquarium and Olympic Sculpture Park are completed; Alaskan Way Viaduct project in construction.*

### Visitor Survey

Over 400 waterfront visitors were surveyed on a Thursday and a Saturday in August, 2001. Questions focused on the visitor's mode of travel to the waterfront, destinations, parking behavior and perceptions, and anticipated future waterfront usage. The survey provides some insight into the typical summertime visitor to the waterfront: he or she is visiting the waterfront for the first time, arrives mid-morning or mid-afternoon, passes up at least one

parking space that is too expensive or too remote, and stays for two to five hours. These and other survey findings helped to inform the key strategy and recommended actions.

### Market Analysis

The market analysis revealed that the pricing of waterfront parking is problematic. Most on-street spaces are metered to provide for up to two hours of parking, not convenient for a longer visit. Most off-street spaces are priced to favor all-day commuter parking rather than shorter visits.

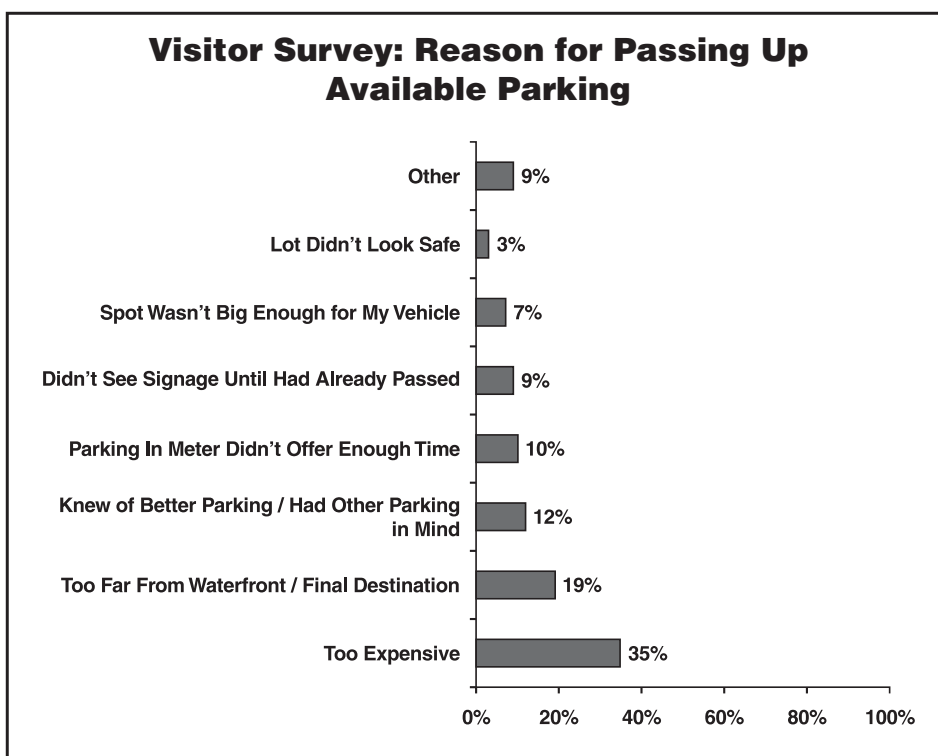
### Economic Conditions

Economic conditions have changed since the strategy was initiated. Parking rates and demand for commuter parking may have declined in some waterfront zones. The strategy is largely aimed at addressing anticipated future conditions, including completion of the Pacific Northwest Aquarium and Olympic Sculpture Park projects, construction or completion of the Alaskan Way Viaduct & Seawall project, and completion of development projects that are currently planned, permitted or in development. However, the strategy would support the marketing of waterfront attractions and businesses, so it may be desirable to implement elements of the strategy in the near term. The scale of implementation of the strategy can be adjusted with economic conditions.

### A Partnership for Waterfront Parking Management

A key strategy emerged from the study process. The essence of the strategy is to direct waterfront visitors to a well-defined set of

Figure 1



convenient, easily identified and appropriately priced parking facilities (See Figure 2). The critical step toward implementation of this strategy is to form a partnership of entities with an important stake in waterfront parking. The partners could jointly implement pricing, marketing and urban design actions that support the key strategy. The actions may be phased in over time.

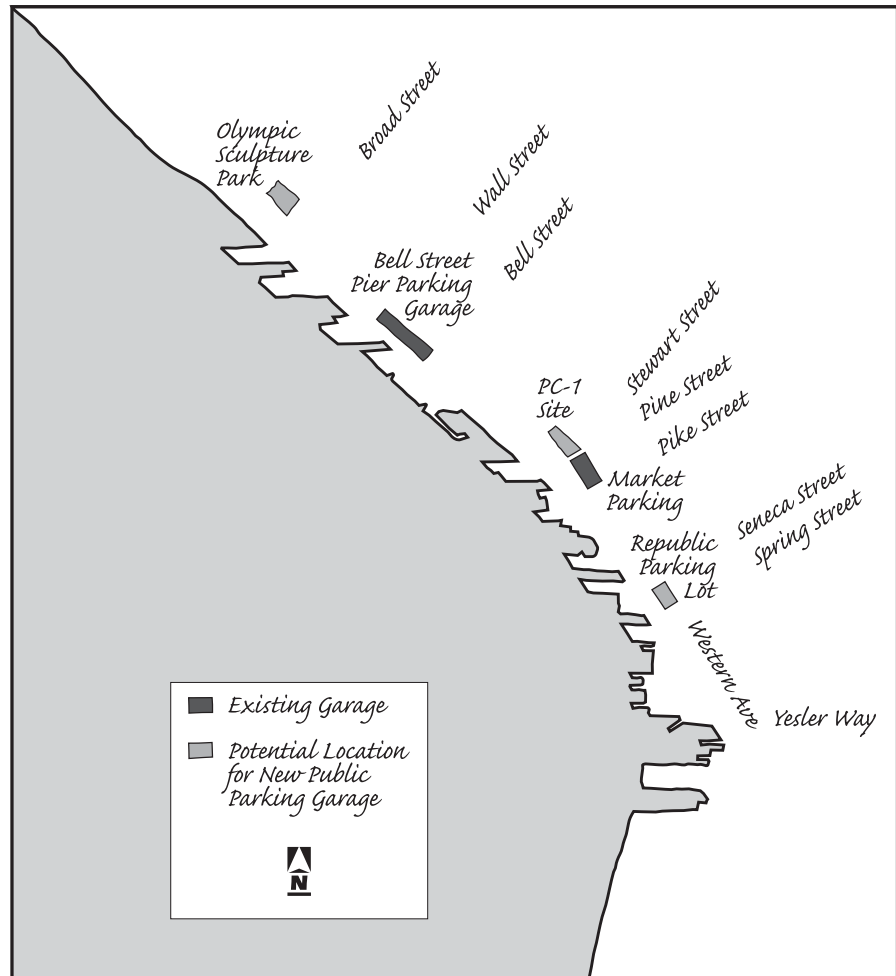
The partners would likely include the study partners, and may include other waterfront businesses, institutions and/or parking operators.

### **Recommended Actions and Functions of the Partnership**

The waterfront parking partnership would:

- Implement a coordinated pricing strategy emphasizing short-term parking at several featured waterfront parking facilities.
- Feature these parking facilities and the pricing scheme in marketing materials produced by individual partners, and jointly produce marketing materials and/or buy advertising to promote the featured parking facilities.
- Improve the visibility and accessibility of the featured facilities through implementation of wayfinding improvements consistent with the City's Downtown Wayfinding conceptual plan. The look and feel of wayfinding improvements could be reflected in marketing materials and advertising.
- Advocate for and/or participate in the development of improved pedestrian facilities at strategic locations related to the featured parking facilities.
- Advocate for and/or participate in the development of improved transit connections that would provide access to remote parking facilities that may be desirable destinations for waterfront visitors (e.g. retail core).

*Figure 2*  
**Potential Featured Parking Facilities**

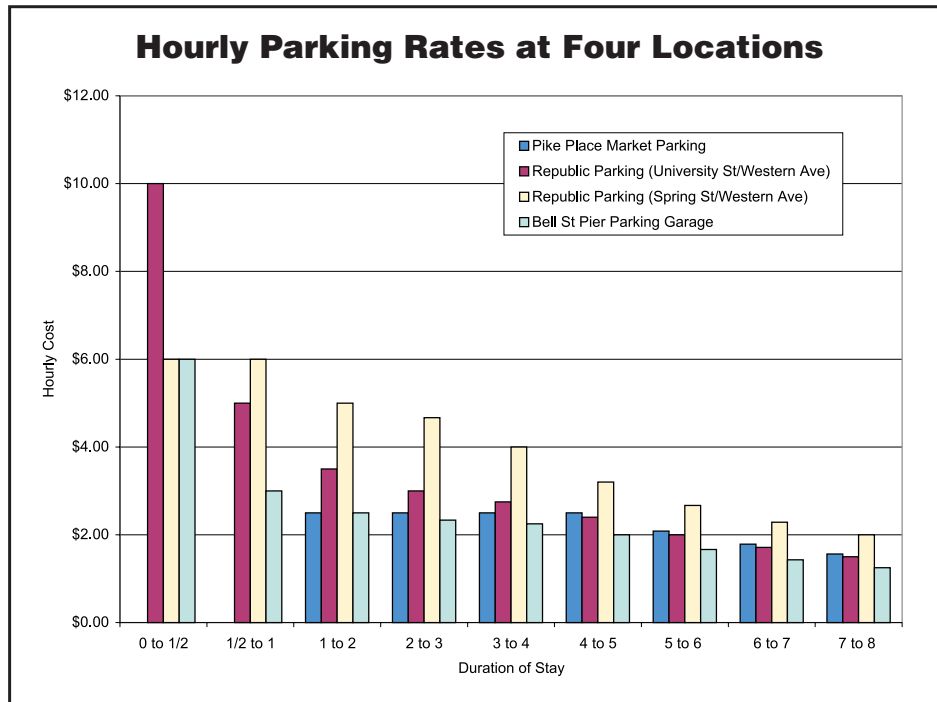


# Waterfront Parking Strategy - DRAFT

## Executive Summary

- Expand the partnership to include future new facilities at strategic locations. Key site/project opportunities include the Olympic Sculpture Park, Pike Place Market PC-1 Site, and Alaskan Way Viaduct replacement parking site options such as the Spring and Western Block.

Figure 3



### Waterfront Parking and the Alaskan Way Viaduct

The strategy is flexible and can be adjusted to existing conditions, construction conditions and future conditions related to the Alaskan Way Viaduct.

Viaduct replacement alternatives will most likely reduce the supply of on-street waterfront parking. If those spaces are replaced at a strategic site, the shift of capacity from on-street to off-street spaces will complement the parking strategy. If the spaces are not replaced,

the loss of on-street spaces will contribute to a future shortage of conveniently located parking.

## **INTRODUCTION**

### **Background and Purpose**

Over the past decade, public and private investments have revitalized the waterfront. The Port of Seattle redeveloped underutilized properties that once served industrial and maritime needs of the city, bringing office and residential uses, a Cruise Ship terminal, a conference center, public boat moorage and a maritime museum to the central waterfront. New projects including the Pacific Northwest Aquarium and the Olympic Sculpture Park promise to bring more visitors to the waterfront, as will increased Cruise Ship sailings.

Several waterfront uses share common visitor characteristics. Visits aimed at recreation, tourism and retail shopping or dining are marked by seasonal attendance fluctuations, and the visits are typically of moderate duration. The common visitor characteristics create an opportunity to cooperate in addressing parking and access needs. The waterfront parking strategy is aimed at this “short-term” parking for recreational, tourism and retail trip purposes. “Short-term” parking is not strictly defined, but contrasts with all-day commuter parking and residential parking facilities. The strategy considers the relationships between short-term parking, commuter parking and residential parking, but commuter and residential parking needs are not a focus of the strategy.

### **Partnership and Study Process**

The need for a waterfront parking strategy was first articulated by the Aquarium Oversight Committee, a group of City and Seattle Aquarium Society officials that provides guidance for the development of the new aquarium. At the request of the Committee, waterfront parking study funds were approved in the 2001 City of Seattle budget and the City’s Strategic Planning Office (SPO) was asked to lead the study.

SPO convenes public private and community stakeholders—the Waterfront Stakeholders Group—on a monthly basis to provide stewardship and coordination of waterfront initiatives. SPO asked members of the Waterfront Stakeholders Group to help develop the scope of work for the waterfront parking strategy. These discussion led to a partnership between SPO and the Seattle Aquarium, Pike Place Market Preservation & Development Authority, Port of Seattle and Metropolitan Improvement District.

The project partners selected a consultant team led by Transportation Solutions Incorporated and including urban designer Jerry Ernst, transportation planner Marni Heffron and parking manager International Parking Management to provide a multi-disciplinary approach to the strategy

### **Related Projects and Plans**

**Center City Open Space & Connections Strategy**

**North Waterfront Access Project**

**Downtown Wayfinding Project**

**Downtown Circulation Study**

**Alaskan Way Viaduct Project**

**Olympic Sculpture Park**

**Pike Place Market PC-1 Site Assessment**

# Waterfront Parking Strategy - DRAFT

## Introduction

The partners established a study area (see Table 2) and agreed the strategy should be based on analysis of the parking market within the study area and a survey of visitors to the area.

The market analysis serves to clarify the nature and magnitude of the parking problem and inform possible solutions. Current parking supply, demand (as measured by occupancy) and prices

Table 2

Study Area Parking Zones					
Waterfront Zone	PSRC Zone	Zone Boundaries			
		North	South	West	East
South	1	Jackson St.	Atlantic St.	Harbor	2 <sup>nd</sup> Ave.
	3	Yesler Way	Jackson St.	Harbor	2 <sup>nd</sup> Ave.
	4	Marion St.	Yesler Way	Western Ave.	2 <sup>nd</sup> Ave.
Central	5	Seneca St.	Marion St.	Western Ave.	2 <sup>nd</sup> Ave.
	6	Virginia St.	Yesler Way	Harbor	Western Ave.
	7	Stewart St.	Seneca St.	Western Ave.	2 <sup>nd</sup> Ave.
		Lenora St.			
North	9	Denny Way	Battery St.	Harbor	2 <sup>nd</sup> Ave.
	10	Battery St.	Stewart St.	Battery St.	2 <sup>nd</sup> Ave.
			Lenora St.	1 <sup>st</sup> Ave.	

were identified within the study area, and by three sub-areas for the south, central and north waterfront (see Table 2).

A future parking scenario was developed, including changes in supply and demand that are anticipated based on planned development projects.

The visitor survey, presented in the *Waterfront Parking Strategy Technical Report*, provides information about the typical peak season visitor to the waterfront, including their experience, perceptions and preferences with regard to parking within the study area. Over 400 visitors were surveyed over a three-day span in August 2001.

## **MANAGING WATERFRONT PARKING**

### **Featured Facilities, Pricing, Information & Marketing**

One of the most striking findings of the visitor survey is that waterfront visitors typically spent twenty minutes looking for a parking space. Many visitors reported passing up an available space to look for a more convenient or less expensive space. These findings are consistent with the results of the market analysis, which shows that while the parking supply is sufficient to meet demand, most of the conveniently located parking is not conveniently priced. On-street meters are best for short visits, while off-street spaces are often priced to favor “early-bird” arrivals for commuter parking.

To serve Market shoppers, Aquarium visitors, tourists and the like, a portion of the waterfront parking supply must be managed to meet their needs. Pricing should favor the relatively short-term stay of these visitors over all-day commuter parking, marketing and advertising materials should identify the facilities that cater to these visits, signage and streetscape elements should help these visitors find the featured parking facilities, and good pedestrian connections to the facilities should be provided.

### **Pricing**

Currently, pricing at several key waterfront parking facilities favors long-term parking over short-term parking (Figure 3). Even where short-term parking rates are affordable (Public Market Garage), long-term rates are also affordable, so commuters eligible for “early-bird” rates may occupy many of the available spaces.

Pricing that favors short-term parking would increase the supply of parking available for waterfront visitors. Coordinated pricing at key facilities makes it possible to provide information about the most convenient parking options to waterfront visitors.

Parking providers that are also short-term activity generators (e.g. Port of Seattle Bell Street Pier, Pike Place Market) have the greatest incentive to adjust their pricing to serve short-term visitors. Other providers may follow suit to compete, or could be given incentives to adjust their pricing.

Pricing can be varied by season to maximize revenue.

### **Information and Marketing**

Once a short-term parking strategy is in place at several key facilities, those facilities can be featured in marketing materials and advertising. This includes activity-specific marketing and advertising (e.g., Aquarium, Pike Place Market) and joint marketing/advertising efforts for the waterfront.

### **Potential Featured Facilities (Existing)**

#### **The Bell Street Pier Garage**

Owner/Operator: Port of Seattle

Capacity: 1,700 spaces

Vehicular Access: Elliott Avenue, Alaskan Way via Wall Street

Pedestrian Access: Alaskan Way via at-grade crossing of railroad at Wall Street and via Bell Street Pedestrian Bridge; Elliott Avenue

Destinations Served: Bell Street Pier (Odyssey Maritime Museum, Restaurants, Conference Center, Cruise Seattle terminal); Three Blocks to Pike Place Market

Opportunities: Wayfinding & Marketing aimed at Pike Place Market visitors could expand usage as overflow Market parking.

#### **Public Market Parking Garage**

Owner/Operator: Pike Place Market Preservation & Development Authority

Capacity: 500 spaces

Vehicular Access: Western Avenue, Alaskan Way

Pedestrian Access: Western Avenue, Alaskan Way, Bridge to Market

Destinations Served: Pike Place Market, Seattle Aquarium

Opportunities: Raising “Early Bird” specials and 6-10 hour rates during peak season would create additional capacity for Market visitors.

#### **Republic Parking—Surface Lot at Spring & Western**

Operator: Republic Parking

Capacity: 200 spaces

Vehicular Access: Western Avenue, Alaskan Way, Spring Street

Pedestrian Access: Western Avenue, Alaskan Way, Spring Street, Harbor Steps via Seneca and Western

Destinations Served: Seattle Aquarium, Seattle Art Museum

Opportunities: Waterfront parking partnership could lease this facility during the peak season and incorporate it into the pricing/marketing strategy.

## Improving Access

### Wayfinding

Wayfinding—including signage and streetscape elements—can be strategically improved with a focus on the featured parking facilities. The City has developed a downtown-wide wayfinding concept

and implemented a demonstration of the pedestrian wayfinding elements. Waterfront parking partners could facilitate implementation of both vehicular and pedestrian wayfinding improvements within the study area for the Waterfront Parking Strategy.

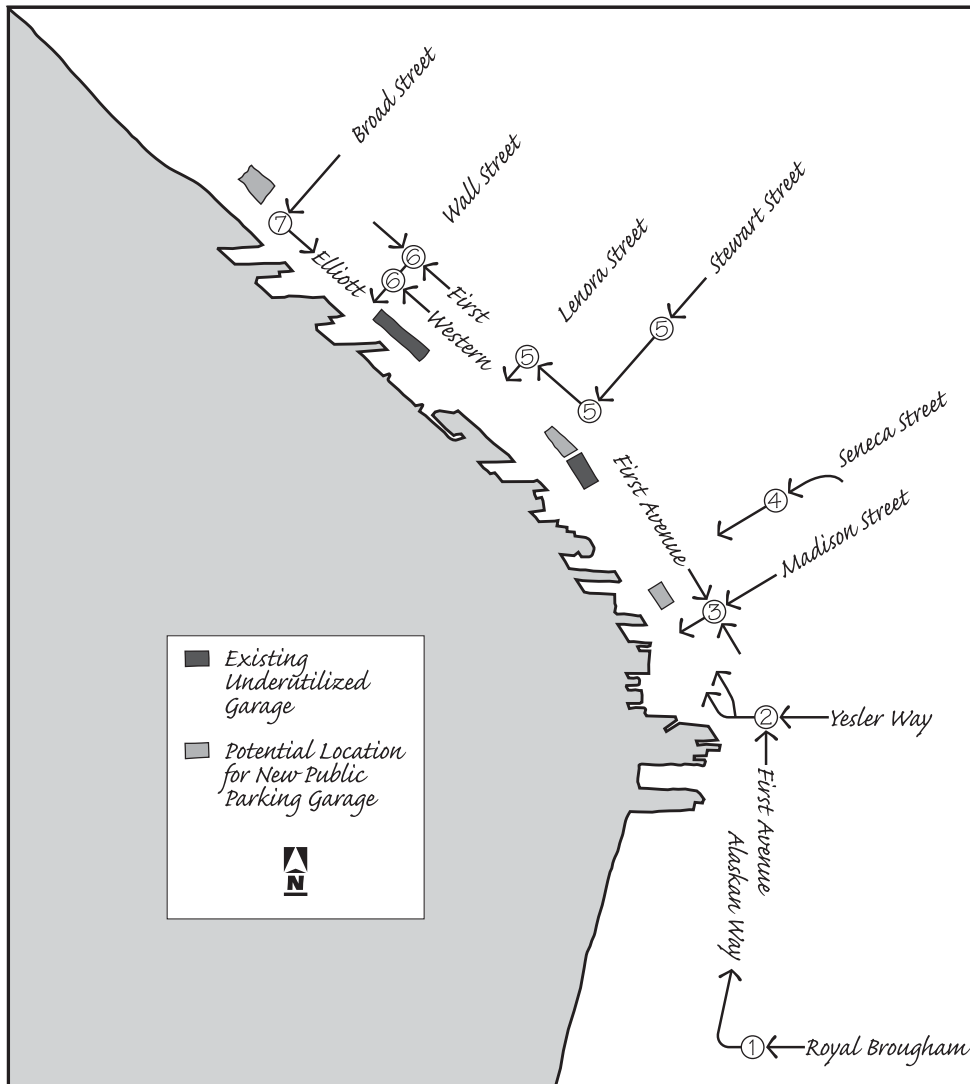
Figure 4 identifies the major vehicular access routes that should be included in a signage system to link primary travel routes to the waterfront with parking facilities. The goal is to direct vehicles to Alaskan Way, Elliott Avenue or Western Avenue. The featured facilities on those streets can be identified with the international parking symbol.

### Pedestrian Connections

Pedestrian access to waterfront destinations is subject to several

challenges. At Alaskan Way, these include steep grades, the Alaskan Way Viaduct, the mainline railroad, complexity of crossing vehicle travel lanes, the bicycle/running trail and the streetcar line. There are additional challenges on the upland side of the waterfront connection, including crossing busy traffic lanes on Elliott and Western avenues that connect to SR 99, and the Viaduct's visual obstruction of access at the Lenora and Bell Street pedestrian bridges.

*Figure 4  
 Opportunities to Improve Vehicle  
 Wayfinding*



Pedestrian routes need to be clear, identifiable, safe appearing, convenient and interesting. Some of the considerations are functional, involving easily walkable grades, good drainage, stairs with landings and, where possible, mechanical assists. Compliance with ADA requirements is, of course, essential. The ability to find your way is largely dependent upon good signing, but is enhanced by the use of consistent materials, the visibility of destinations and the clarity of the route. Appearance is also important. Attractive pedestrian routes invite use. Protection from wind and rain, and access to the sun can also make a pedestrian connection more attractive. Adjacent land uses and activities may be the most important. Routes that pass by retail, outdoor cafes, vendors and places where people gather are both safer and more interesting. Good pedestrian routes also involve pleasant outlooks, viewpoints and resting places.

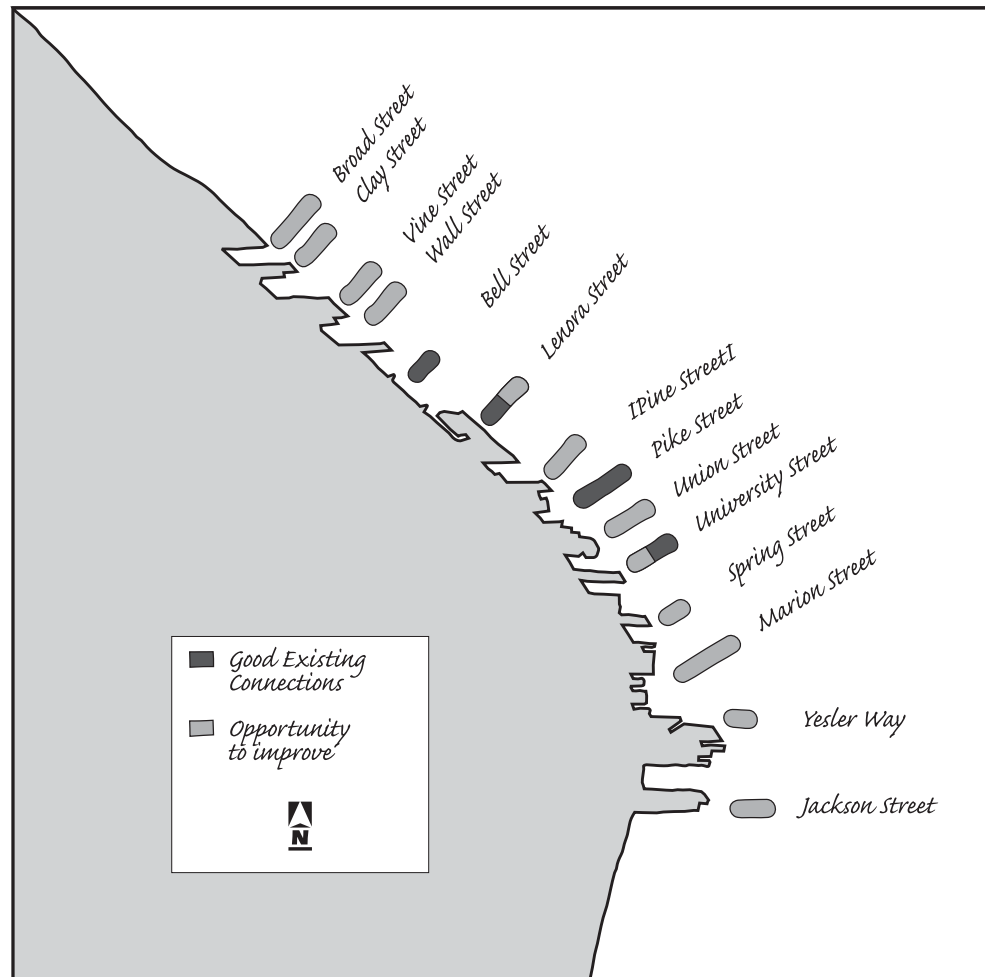
Pedestrian facilities could be improved in a variety of ways to address these challenges. Figure 5

provides a summary of key opportunities to improve pedestrian connections to the parking supply. Some examples include streetscape improvements that clarify pedestrian zones and routes and grade separated pedestrian connections.

Some features of the pedestrian environment would be dramatically altered by any of the conceptual alternatives for replacement of the Alaskan Way Viaduct. Those conceptual alternatives address several of the challenges.

Investments in improved pedestrian connections at Alaskan Way will likely be limited, in the near-term, to those that (a) would not be directly affected by the preferred alternative for Viaduct re-

*Figure 5*  
*Opportunities to Improve*  
*Pedestrian Connections*



placement or (b) are relatively low-cost and high-impact, justifying an investment with a short useful life.

### Transit Connections

Existing transit service to the waterfront is provided primarily by King County Metro Transit Route 99 (the Waterfront Streetcar) and Route 97, a privately subsidized “partnership route” with stops

in the retail core and on Elliott Avenue W (see current routes in Figure 6).

Existing service provides limited connections and limited frequency. Improved service could influence waterfront parking in several ways. Transit trips might replace some auto trips, and remote parking facilities might absorb some of the parking demand.

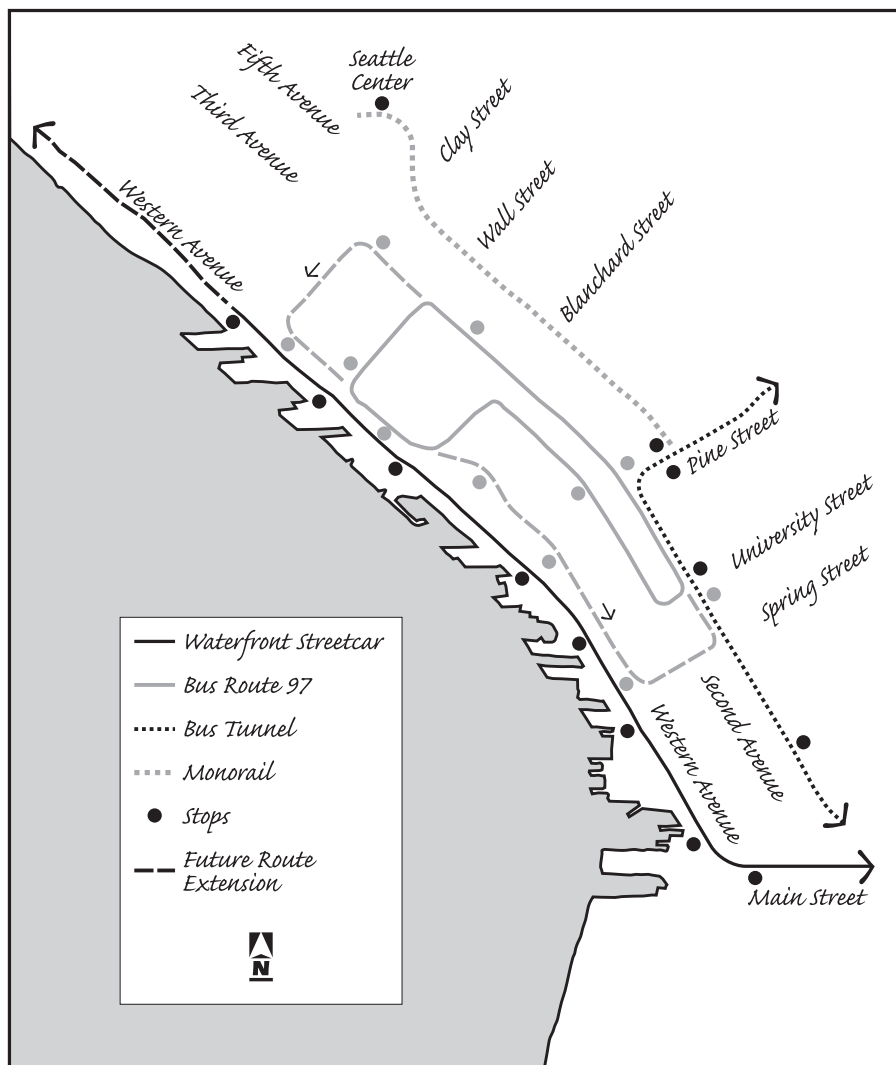
The visitor survey suggests that visitors have limited interest in taking a shuttle from a remote parking location. A transit connection to the retail core might capture some auto trips, however, because of the related trip purposes (visitors may combine waterfront and retail core trips).

### Waterfront Streetcar Improvements

The City recently completed a study of improvements to the Waterfront Streetcar, including more frequent service on the existing route. These

Waterfront Streetcar improvements would not provide a connection to the retail core, but could make transit a more attractive option for some waterfront visitors by improving connections to regional transit at the International District transit tunnel station. Perhaps more significantly, more frequent Waterfront Streetcar service could contribute to the success of a waterfront parking management program by providing easier connections between the featured parking facilities and the specific destinations.

Figure 6  
 Transit Opportunities

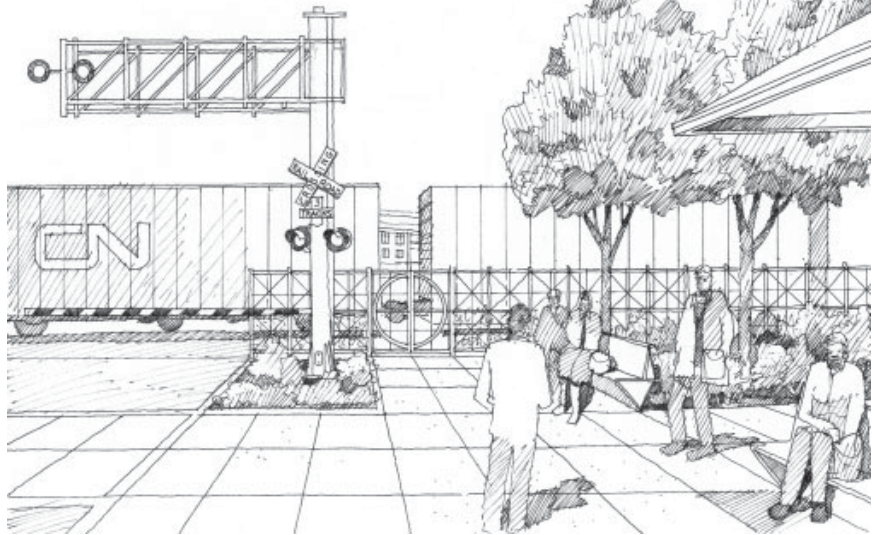


### *Route 97 & Potential Improvements*

The existing Metro Bus Route 97 was developed to serve commute trips to offices along Elliott Avenue (at the World Trade Center and Seattle Trade & Technology Center buildings). The route links these employment sites to the Downtown Seattle Transit Tunnel and major bus routes at Third Avenue and Pine Street. Frequent service (every ten minutes) is provided during peak commuting periods, and the service is provided only on weekdays. The route uses a special 20-passenger shuttle bus rather than a full-sized Metro bus. The operating cost of the route is less than \$200,000 per year, with 85% of the cost covered by the partners and just 15% Metro operating subsidy.

Figure 6 shows a possible expansion of the Route 97 to serve additional waterfront and retail core destinations. This route would provide circulation from the waterfront to the retail and office/hotel core, complementing the Waterfront Streetcar service which

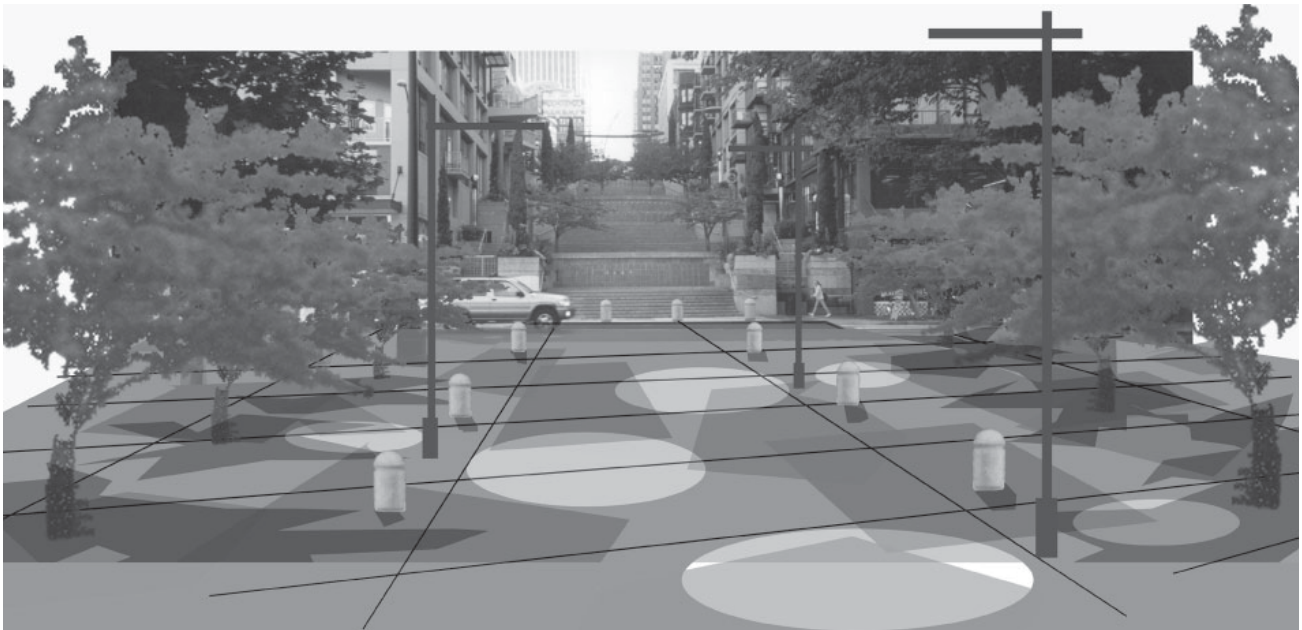
Figure 7



Seattle Transportation/Weinstein Copeland Architects

*Classified zones for pedestrians and vehicles would improve safety at difficult waterfront crossings.*

Figure 8



CityDesign/Mithun Architects+Planners

connects the waterfront to the regional transportation hub at Union Station and King Street Station. An additional operating subsidy would be required to expand the route and to provide frequent

*Pavement treatments can serve as a wayfinding device at key pedestrian connections.*

service on summer weekends and summer weekday afternoons. Waterfront parking partners might consider joining existing Route 97 partners to provide the additional operating subsidy, which would likely be in the \$100,000 to \$200,000 range.

### **Opportunities for New Facilities**

The Waterfront Parking Strategy identifies three key sites that present opportunities to develop new facilities that could be integrated into waterfront parking management. These sites are considered opportunities because of their proximity, visibility and accessibility to waterfront attractions and because of the compatibility of public parking with development plans for the sites. Parking development concepts for each site were considered to provide comparative information on the subsidy that might be required to provide public, short-term parking at each of the sites (given site characteristics and current market conditions). Analysis of the opportunities at these sites is summarized below, with assumptions and financial analysis detailed in the Waterfront Parking Strategy Technical Report.

#### **Olympic Sculpture Park**

The Seattle Art Museum has acquired two parcels for development of the Olympic Sculpture Park. Some parking is planned as part of the project, and the large site footprint and accessibility of the upper parcel present an opportunity to integrate a large, multi-purpose parking facility into the project.

The site characteristics suggest the potential to develop a parking structure with up to 500 spaces. Projected demand indicates that a 325-space garage could be built at a cost of approximately \$33,600 per stall. This cost estimate includes design fees, taxes, and financing costs. Demand projections incorporated OSP primary parking demand as well as demand generated by evening OSP events and general waterfront and business related demands. Revenue projections indicate that an annual subsidy of approximately \$28 per space would be required.

#### **Pike Place Market**

The Pike Place Market PDA is currently conducting a site assessment of the PC-1 site. PDA studies indicate that up to 226 spaces could be developed on the site. Construction costs (not including design fees, taxes, finance costs) for a garage and above grade retail and residential uses were estimated at \$5.2 M in 1998. The projection conducted for this study focused on just the 226-space garage component of the project and concluded that it would cost approximately \$31,500 per space with a net annual income of approximately \$140 per stall.

## **Spring & Western Block**

Currently, Republic Parking operates a 200-space public parking facility at a surface lot on the block bounded by Spring Street, Western Avenue, Seneca Street and Alaskan Way (see Map). The site advantages include proximity to waterfront attractions, at grade access to the waterfront and downtown, vehicular access to the waterfront and downtown, and a large footprint allowing for efficient garage layout. The Spring & Western Block could serve as a site for replacement parking facilities that may be associated with some alternatives for replacement of the Alaskan Way

Current code requirements would allow for an above grade seven-story structure that would provide 700 parking spaces. The cost estimate did not assume any retail on the ground floor but did allow for façade upgrades. The facility would cost approximately \$25,800 per stall to build and provide an estimated annual net income of \$1,300 per stall after debt service.

## **Implementing the Strategy**

### **Creating a Parking Partnership: Structural Options**

Creating a parking partnership is the key step toward implementation of the strategy. There are several structural options for such a partnership. The Waterfront Parking Strategy does not propose a specific approach to the partnership, but notes three key questions to be addressed: who are the partners, what is the instrument of the partnership, and who is the parking manager.

#### *Who are the Partners?*

The five partners in development of the Waterfront Parking Strategy are likely candidates for the parking partnership. However, some waterfront businesses and property owners that have to date participated indirectly as members of the Metropolitan Improvement District may wish to participate more directly in a parking partnership.

#### *What is the Instrument of the Partnership?*

There are several options for establishing the legal and institutional elements of the partnership—the instrument. Perhaps the most flexible instrument of partnership would be a contract. Prospective partners could negotiate all of the practical aspects of the partnership and enter into an agreement that reflects their understandings and commitments.

A new or existing entity could take on the implementation functions of the strategy. The existing institutional framework of the entity might serve as the primary instrument of partnership; for example, if the Metropolitan Improvement District acted as the parking manager, membership in the MID would be the primary instrument of partnership.

## **Potential Featured Facilities (Future)**

### **Olympic Sculpture Park Parking**

General purpose parking at this facility could serve central waterfront uses if Waterfront Streetcar service is increased and if owner/operator participates in the parking partnership.

### **Market PC-1 Site**

Up to 150 net new spaces could be provided at this site, effectively expanding the capacity of the Public Market Garage.

### **Parking Structure at Republic Parking Site**

Current conceptual alternatives for the Alaskan Way Viaduct project identify this site as a potential location for a parking structure to replace parking eliminated as part of the project. Even if no new spaces are created on a net basis, consolidation of waterfront parking supply into a public facility at this site would complement the featured facilities strategy.

## **Waterfront Parking Strategy - DRAFT**

### **Managing Waterfront Parking**

#### *Who is the Parking Manager?*

The parking manager could be private parking operator operating under contract to the partnership, one of the partners, or new entity such as a non-profit or public development authority.

## MARKET ANALYSIS

Key findings of the market analysis are presented below. Additional detail is available in the *Waterfront Parking Strategy Technical Report*.

### Goals of the Market Analysis

The goals of the market analysis were to:

- Clarify the nature and magnitude of the parking problem and inform possible solutions.
- Forecast changes in supply and demand to quantify parking needs at an “order of magnitude” level.
- Provide information on current pricing.

Table 3

<b>1999 Off-Street Public Parking Demand</b>				
Supply and Demand	Waterfront Zone			Total
	South	Central	North	
Supply	3,850	4,325	5,228	13,404
AM Demand	2,568	3,350	3,751	9,669
% Occupied	67%	77%	72%	72%
PM Demand	2,804	3,265	3,685	9,754
% Occupied	73%	76%	70%	73%

### Data and Methods

A number of data sources and approaches were used to develop this profile of Waterfront parking characteristics. They include the following:

1. Off-street parking supply information is based on the 1999 Puget Sound Regional Council (PSRC) Parking Inventory Report. Data for this report were collected in April and May of 1999. This information was validated by confirming the current status of public parking lots and documenting parking supplies added since 1999.
2. Off-street parking demand data were derived from the 1999 PSRC report.
3. On-street parking supply and demand data were established by means of field counts made in June 2001.
4. Current pricing levels for off-street public parking supplies were documented by field checks to update the pricing data contained in the 1999 PSRC report.
5. The forecast of future parking supply and potential demand was made by researching existing construction activity, planned developments, and potential development opportunities that would be occupied or under construction by 2006. The primary data sources for this research were files maintained by the Strategic Planning Office and the Downtown Seattle Association.

### Key Findings

As shown in Table 4, 2001 Parking Rates, all-day parking costs at “early bird” special rates are typically no more than twenty-five percent greater than the cost of parking for up to two hours. Within the central parking zone, this cost structure characterizes 86% of the available supply.

Table 4

2001 Parking Rates									
Parking Rate	Waterfront Parking Zone								
	South			Central			North		
	Cost	Supply	% of Supply	Cost	Supply	% of Supply	Cost	Supply	% of Supply
0-2 Hours	\$6.36	2,625	71%	\$7.17	4,441	100%	\$5.99	3,059	90%
Daily	\$11.64	3,668	100%	\$14.45	4,441	100%	\$11.75	3,137	93%
Monthly	\$170.66	2,038	55%	\$172.66	3,839	86%	\$125.48	1,431	42%
Early Bird	\$7.76	1,288	35%	\$8.91	3,839	86%	\$6.94	1,274	38%
Total Supply		3,675	100%		4,441	100%		3,391	100%

Table 5, Projected Public Parking Supply and Demand, was developed for a future scenario that assumes completion of the Pacific Northwest Aquarium and build-out of development projects that are currently planned or in development. Occupancy tightens in all zones, but does not reach “full” occupancy, within these broad zones. Table 1, “Projected Future Supply and Demand in Primary Waterfront Zone”(see page 1 of this report.) shows that demand will exceed supply in the area closest to major waterfront attractions if no new pricing strategies are introduced.

Table 5

<b>Projected Public Parking Supply and Demand</b>									
Supply/ Demand	Waterfront Parking Zone								
	South			Central			North		
	On-Street		Off-Street	On-Street		Off-Street	On-Street		Off-Street
	Un-Metered	Metered	Public Lots	Un-Metered	Metered	Public Lots	Un-Metered	Metered	Public Lots
Future Supply	327	529	3,579	104	583	4,275	437	723	4,788
2001 Demand	569	373	2,804	116	514	3,265	289	541	3,685
Change in Demand	-269	70	249	-21	-44	665	25	50	300
Future Demand	300	423	3,053	95	470	3,930	314	591	3,985
<b>Future % Occupied</b>	<b>92%</b>	<b>80%</b>	<b>85%</b>	<b>91%</b>	<b>81%</b>	<b>92%</b>	<b>72%</b>	<b>82%</b>	<b>83%</b>
<b>2001 % Occupied</b>	<b>81%</b>	<b>62%</b>	<b>73%</b>	<b>81%</b>	<b>75%</b>	<b>76%</b>	<b>66%</b>	<b>67%</b>	<b>70%</b>
<b>% Increase in Demand</b>	<b>+11%</b>	<b>+18%</b>	<b>+12%</b>	<b>+10%</b>	<b>+6%</b>	<b>+16%</b>	<b>+6%</b>	<b>+15%</b>	<b>+13%</b>

## VISITOR SURVEY

Key findings of the visitor survey are presented below. Additional detail is available in the *Waterfront Parking Strategy Technical Report*.

### Goals of the Visitor Survey

The goals of the visitor survey were to:

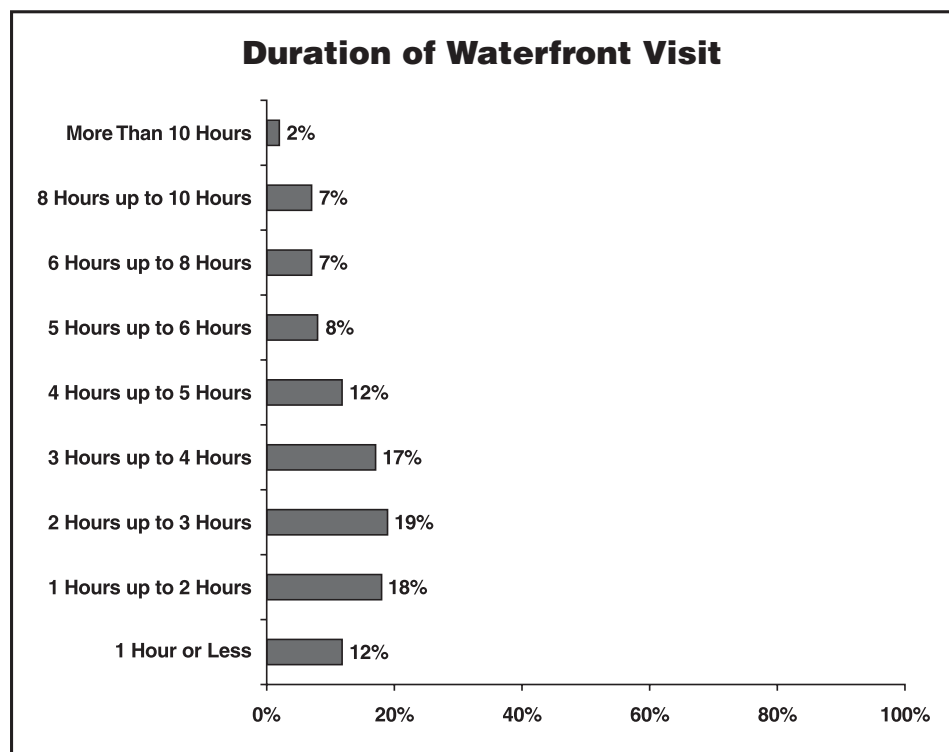
- Establish existing travel and parking characteristics of Waterfront visitors;
- Test visitors' willingness to consider alternative travel and or/ parking arrangements;
- Determine decision drivers – location, price, group size and composition – related to parking decisions;
- Assess appropriate and preferred communication channels for downtown access, parking and travel modes.

### Survey Method

To satisfy these objectives, an intercept survey consisting of 426 interviews with Waterfront visitors 18 years of age or older, who reside outside the study area and indicate that the Waterfront area was their intended destination was conducted. Northwest Research Group intercepted visitors at three locations along the Waterfront:

- The east side of Alaskan way at the Pike Hill Climb
- The west side of Alaskan Way at the Bell Street Pier
- The west side of Alaskan Way at Pier 55 or 56

Figure 9

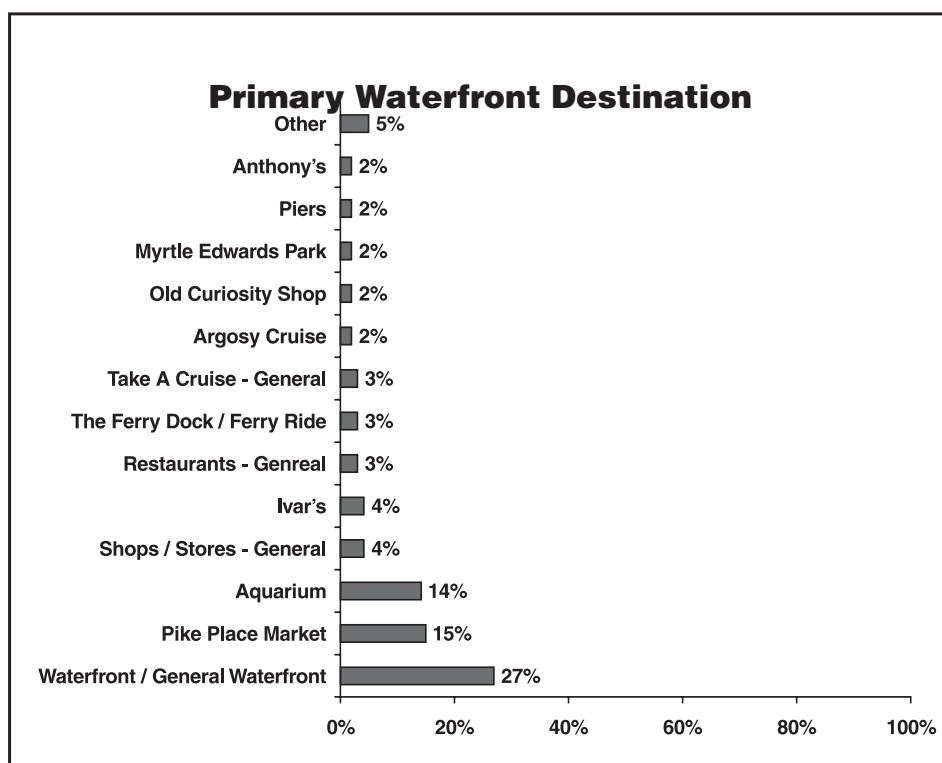


### Survey Results: Highlights

Highlights of the survey include:

- Two-thirds (62%) of Waterfront visitors are not local residents.
- On average, Waterfront visitors spend four hours at the Waterfront.
- Peak arrival times for all respondents are between 9:00 and 11:00 A.M. (27%) and 1:00 and 3:00 P.M. (27%). Peak departure times are between 1:00 and 3:00 P.M. (26%) and 3:00 to 5:00 P.M. (30%).

Figure 10



- Slightly more than half (52%) of all respondents indicate they are visiting the Waterfront to sightsee. An additional thirty-percent (30%) are at the Waterfront to visit the Waterfront itself. Seventeen percent (17%) of all respondents who had a secondary Waterfront destination indicate their secondary destination was the Pike Place Market.

- The majority (93%) of respondents who drove to the Waterfront indicate they did not do any research regarding parking options prior to traveling to the Waterfront.

Those respondents who did research parking options ahead of time indicate the main reason they did so was to know ahead of time where they were going to park.

- The best way the Waterfront could communicate parking options would be to improve signage and have a Waterfront web site with parking options listed.
- The attributes rated of most importance to respondents are availability of parking at the Waterfront (4.2), the quickness of locating a spot (4.1), and cost of parking (4.0).

### Survey Results: Highlights

- Almost one-third (29%) of respondents indicate that having more frequent buses scheduled, more buses, and improved access to buses would allow them to consider using transit or using it more often.
- Respondents are most likely to drive, park at the Seattle Center and ride a shuttle to the Waterfront that costs from \$0 to \$2.00 and not at all likely to use valet parking on the Waterfront if offered for \$10 to \$15 for up to four hours.
- Almost half of all respondents (45%) indicate parking would have to cost more than \$25.00 before they would not visit the Waterfront. Half (53%) of all respondents indicate parking would have to cost more than \$25.00 before they would use a travel mode other than a car.

*Figure 11*

